

Just-in-Time Instructions for: Create and Edit Groups

Groups (formerly known as “Overview”) contain related Items that are managed together under a common heading or title. For example, a records schedule filed by an agency may contain the below Group and Items:

- **Group Title:** Photographs/ Still Pictures and Moving Imagery
 - **First Item:** Copies and Near Duplicates of Imagery
 - **Second Item:** Noteworthy Imagery

You may access the Groups functionality from the Items tab. Upon landing on the Items tab, you will be presented with the following options:

- **Create New Item** - allows the user to create an Item.
- **Create New Group** - allows the user to create a new Group.



Figure 1: Items Tab Create New Group Function

 A Records Schedule may contain more than one Item or Group. It may be helpful to enter all your Items prior to associating them with a Group(s); especially if you have more than 10 Items. It may also be helpful to have all your Item details available in a table or spreadsheet that can support you in copying and pasting them into ERA 2.0. See the **Creating and Editing Items** job aid for

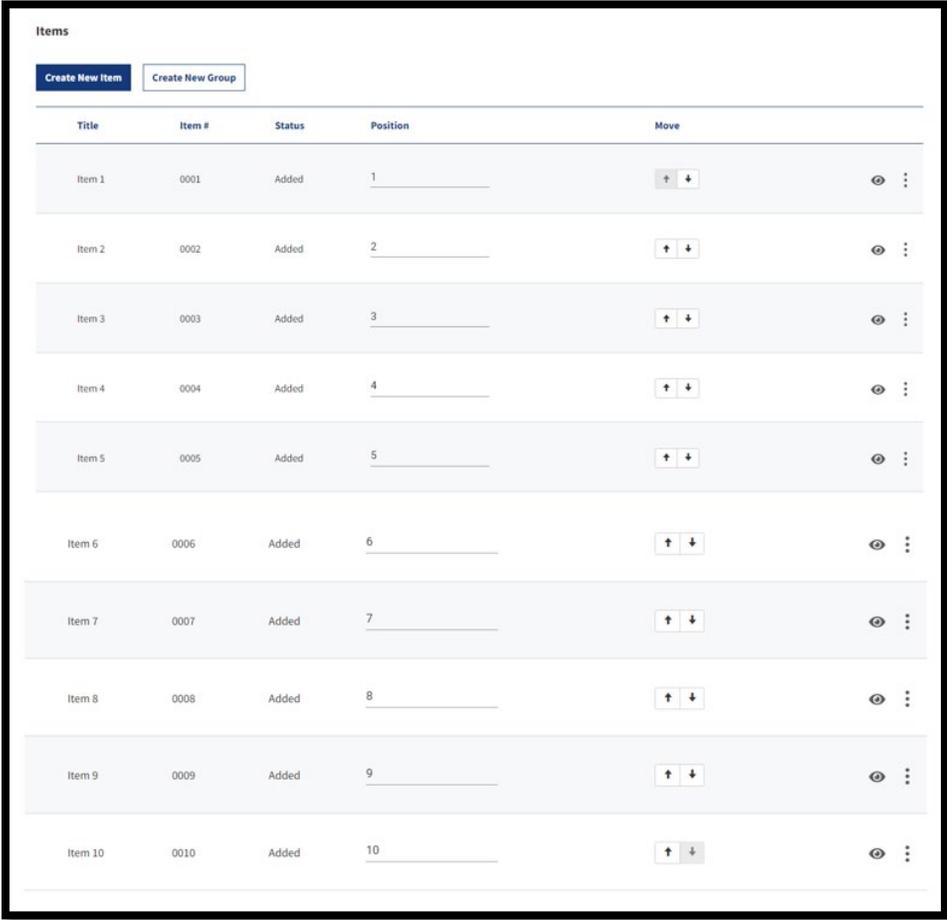
instructions on creating and editing Items.

Create and Edit Groups

The instructions below include populated examples to facilitate ease of understanding.

The data included in the examples are mostly notional (e.g., Item #1, Item #2, etc.) so that the focus remains on the task structure and not the example content.

Note: The example provided in the job will present recommended approach for creating more than 1 group and then associating items with each group.



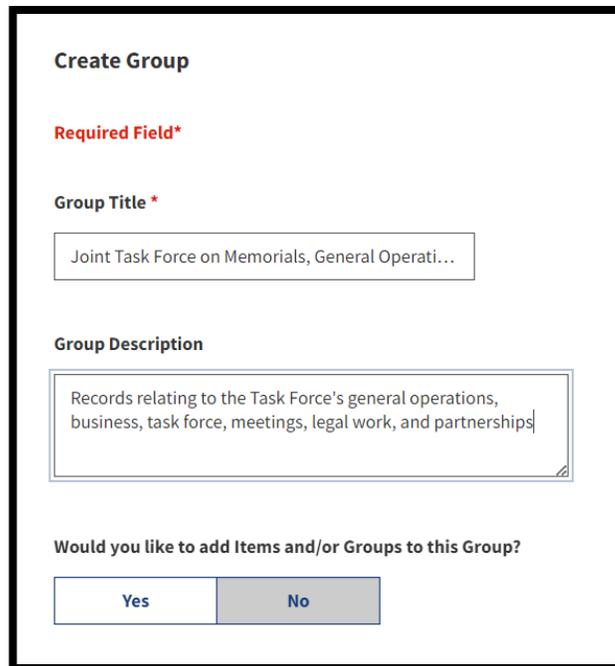
Title	Item #	Status	Position	Move
Item 1	0001	Added	1	↑ ↓
Item 2	0002	Added	2	↑ ↓
Item 3	0003	Added	3	↑ ↓
Item 4	0004	Added	4	↑ ↓
Item 5	0005	Added	5	↑ ↓
Item 6	0006	Added	6	↑ ↓
Item 7	0007	Added	7	↑ ↓
Item 8	0008	Added	8	↑ ↓
Item 9	0009	Added	9	↑ ↓
Item 10	0010	Added	10	↑ ↓

Figure 2: Items Tab Displaying 10 Items



Create First Group

1. Select **Create New Group** on the Items tab. The Create Group tab displays.
2. Enter the **Group Title** and **Group Description** in their corresponding text-entry fields.



The screenshot shows a web form titled "Create Group". At the top, it says "Required Field*" in red. Below that is the "Group Title *" field, which contains the text "Joint Task Force on Memorials, General Operati...". Underneath is the "Group Description" field, which contains the text "Records relating to the Task Force's general operations, business, task force, meetings, legal work, and partnerships". At the bottom of the form, there is a question: "Would you like to add Items and/or Groups to this Group?". Below this question are two buttons: "Yes" and "No". The "No" button is highlighted in grey, indicating it is the selected option.

Figure 3: Create Group Tab: Populated Title and Description for Group 1

3. Select **No** in reply to: *Would you like to add Items and/or Groups to this Group?*

The **Create Group** and **Create Group and Add Another** functions become available at the bottom of the Items tab. *If you select Yes: The Select Items and Groups menu displays.*

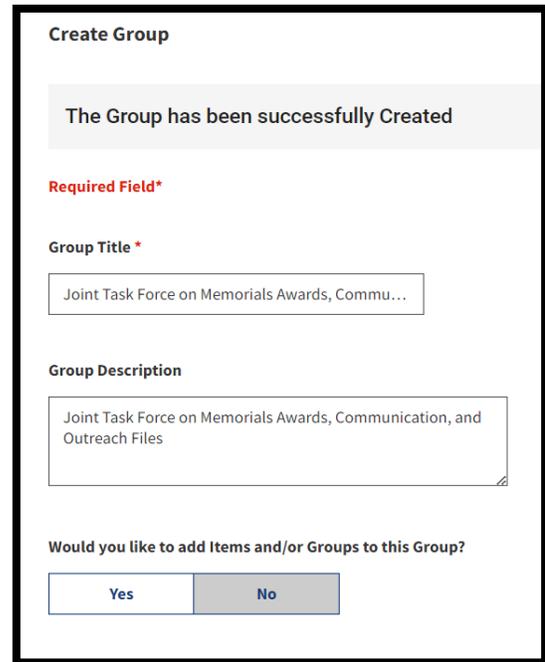
4. Select **Create Group and Add Another**. The Create Group tab displays.

Create Second Group

Notice the message that displays above the data entry fields confirming that the first group was created successfully.

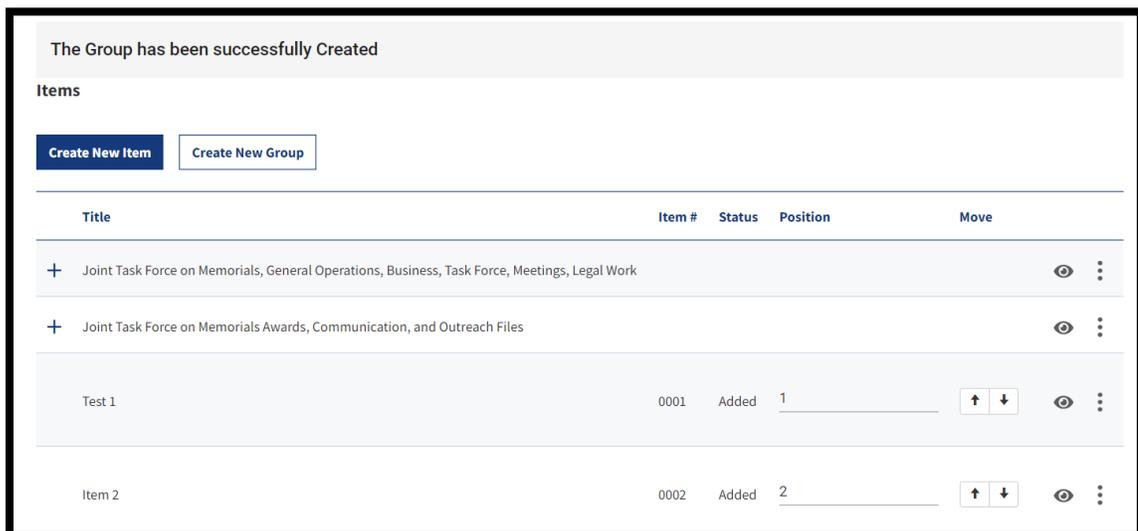
1. Enter the **Group Title** and **Group Description** in their corresponding text-entry fields.
2. Select **No** in reply to: *Would you like to add Items and/or Groups to this Group?*
3. Select **Create Group**. The **Items** tab displays the newly created groups at the top of the table.

Items that are available for association with a group display directly below the groups on the **Items** table.



The screenshot shows a 'Create Group' form. At the top, a grey message box says 'The Group has been successfully Created'. Below this, a red 'Required Field*' label is visible. The 'Group Title*' field contains the text 'Joint Task Force on Memorials Awards, Commu...'. The 'Group Description' field contains 'Joint Task Force on Memorials Awards, Communication, and Outreach Files'. At the bottom, there is a question 'Would you like to add Items and/or Groups to this Group?' with two buttons: 'Yes' and 'No'. The 'No' button is selected.

Figure 4: Create Group Tab: Populated Title and Description for Group 2

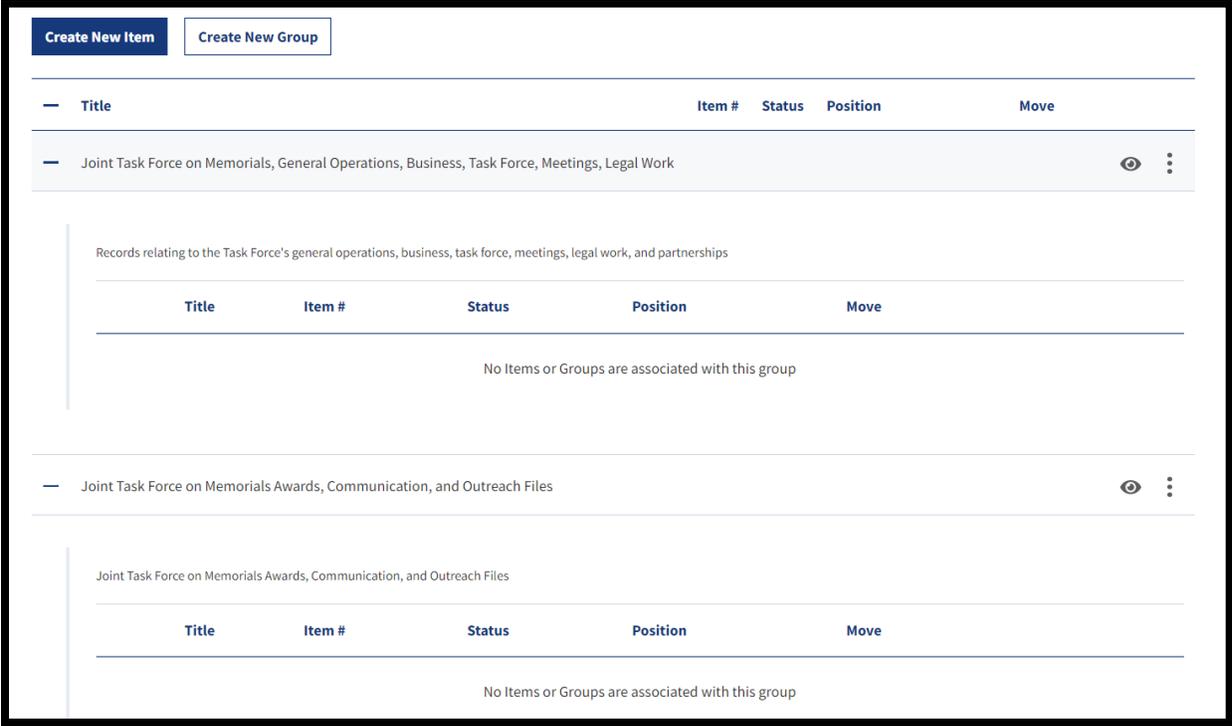


The screenshot shows the 'Items' tab interface. At the top, a grey message box says 'The Group has been successfully Created'. Below this, there are two buttons: 'Create New Item' and 'Create New Group'. The main area contains a table with the following data:

Title	Item #	Status	Position	Move
+ Joint Task Force on Memorials, General Operations, Business, Task Force, Meetings, Legal Work				👁️ ⋮
+ Joint Task Force on Memorials Awards, Communication, and Outreach Files				👁️ ⋮
Test 1	0001	Added	1	⬆️ ⬇️ 👁️ ⋮
Item 2	0002	Added	2	⬆️ ⬇️ 👁️ ⋮

Figure 5: Closeup of Items Tab Populated with 2 Items and 2 Groups

 You may verify the items that are associated with a group by expanding the **plus (+) symbol** to the left of each group. Select the **minus (-) symbol** to collapse the table.



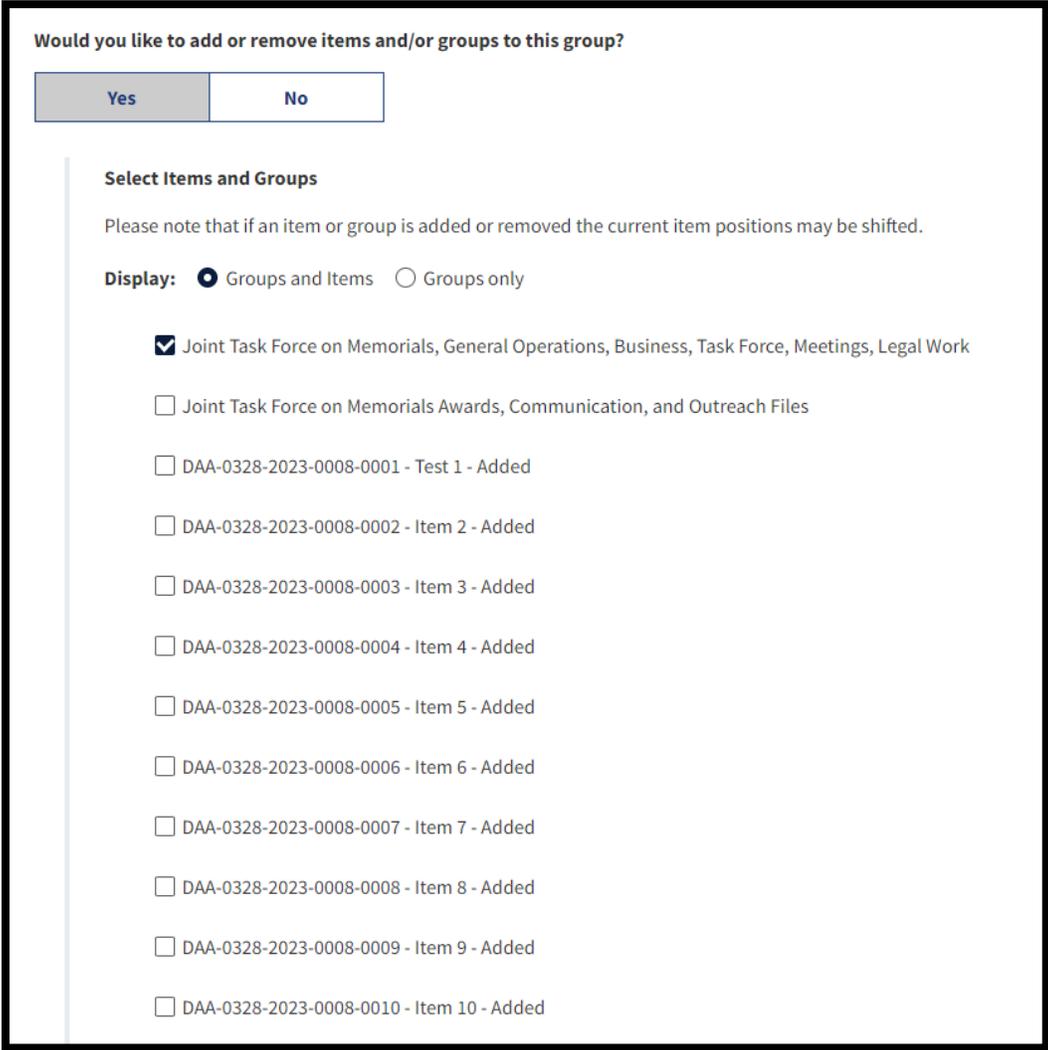
The screenshot displays a web interface with two main buttons at the top: "Create New Item" (in a dark blue box) and "Create New Group" (in a white box with a blue border). Below these buttons is a table with the following structure:

—	Title	Item #	Status	Position	Move	
—	Joint Task Force on Memorials, General Operations, Business, Task Force, Meetings, Legal Work					 
Records relating to the Task Force's general operations, business, task force, meetings, legal work, and partnerships						
	Title	Item #	Status	Position	Move	
No Items or Groups are associated with this group						
—	Joint Task Force on Memorials Awards, Communication, and Outreach Files					 
Joint Task Force on Memorials Awards, Communication, and Outreach Files						
	Title	Item #	Status	Position	Move	
No Items or Groups are associated with this group						

Figure 6: Items Table: Expanded View of 2 Groups

Edit/Modify Group – Add Items to Group

1. Select the **Open** “eye” icon to the right of any group to view its content. The Modify Group page displays.
2. Toggle the **menu radio buttons** to display **Groups and Items** or **Groups Only**. Results display based on your selection.
3. Select **Yes** in response to the prompt: *Would you like to add or remove items and/or groups to this group?*



The screenshot shows a dialog box titled "Would you like to add or remove items and/or groups to this group?". At the top, there are two buttons: "Yes" (highlighted) and "No". Below the buttons, the section is titled "Select Items and Groups". A note states: "Please note that if an item or group is added or removed the current item positions may be shifted." Underneath, there is a "Display:" label with two radio buttons: "Groups and Items" (selected) and "Groups only". A list of items follows, each with a checkbox. The first item, "Joint Task Force on Memorials, General Operations, Business, Task Force, Meetings, Legal Work", is checked. The remaining items are unchecked and include "Joint Task Force on Memorials Awards, Communication, and Outreach Files" and ten items labeled "DAA-0328-2023-0008-0001 - Test 1 - Added" through "DAA-0328-2023-0008-0010 - Item 10 - Added".

Figure 7: Add Items Dialog Box



4. Select the **checkbox** to the left of the items and/or groups you want to add to the group you created.

Would you like to add or remove items and/or groups to this group?

Yes No

Select Items and Groups

Please note that if an item or group is added or removed the current item positions may be shifted.

Display: Groups and Items Groups only

- Joint Task Force on Memorials General Operation, Business, Meetings, and Legal Work
- Joint Task Force on Memorials Awards, Communication, and Outreach Files
- DAA-0328-2023-0009-0001 - Item 1 - Added
- DAA-0328-2023-0009-0002 - Item 2 - Added
- DAA-0328-2023-0009-0003 - Item 3 - Added
- DAA-0328-2023-0009-0004 - Item 4 - Added
- DAA-0328-2023-0009-0005 - Item 5 - Added
- DAA-0328-2023-0009-0006 - Item 6 - Added
- DAA-0328-2023-0009-0007 - Item 7 - Added
- DAA-0328-2023-0009-0008 - Item 8 - Added
- DAA-0328-2023-0009-0009 - Item 9 - Added
- DAA-0328-2023-0009-0010 - Item 10 - Added

Figure 8: Add Items Dialog Box with 5 Items Selected

5. Select **Save Changes**.
6. Repeat **Steps 1 through 5** for each group you want to modify. When completed, the Items tab displays updated results.

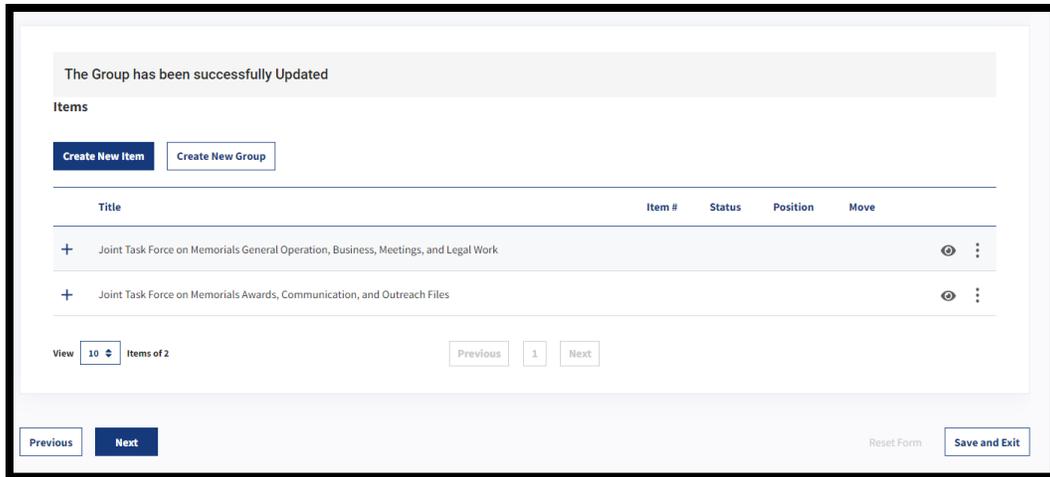


Figure 9: Updated Items Tab Populated with 2 Groups

7. Expand the **plus (+) symbol** to the left of each group to verify that the items are placed in the correct group.

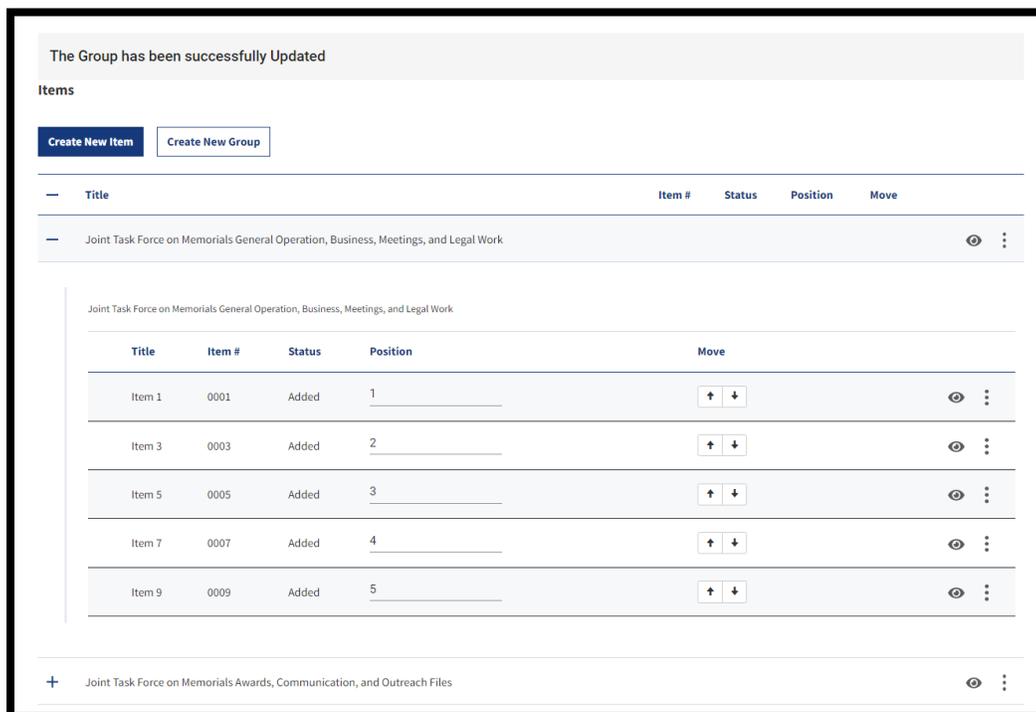


Figure 10: Closeup of Items Associated with Group 1

8. Select the **minus (-) symbol** to collapse the group.

Edit/Modify Group – Delete Group

1. Select the **Delete** function from the menu options at the left of the group you want to delete.

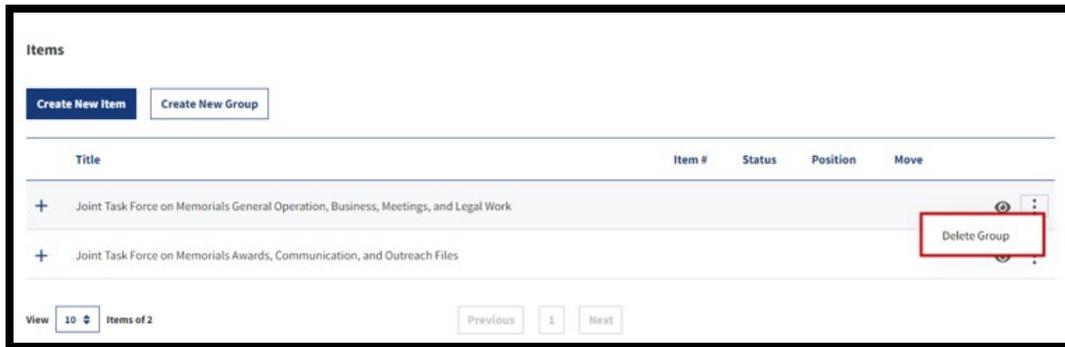


Figure 11: Delete Group Function on Items Tab

2. Choose an **appropriate option** from the confirmation dialog that displays. *Options are: Delete all items/groups within or Delete Group Only.*

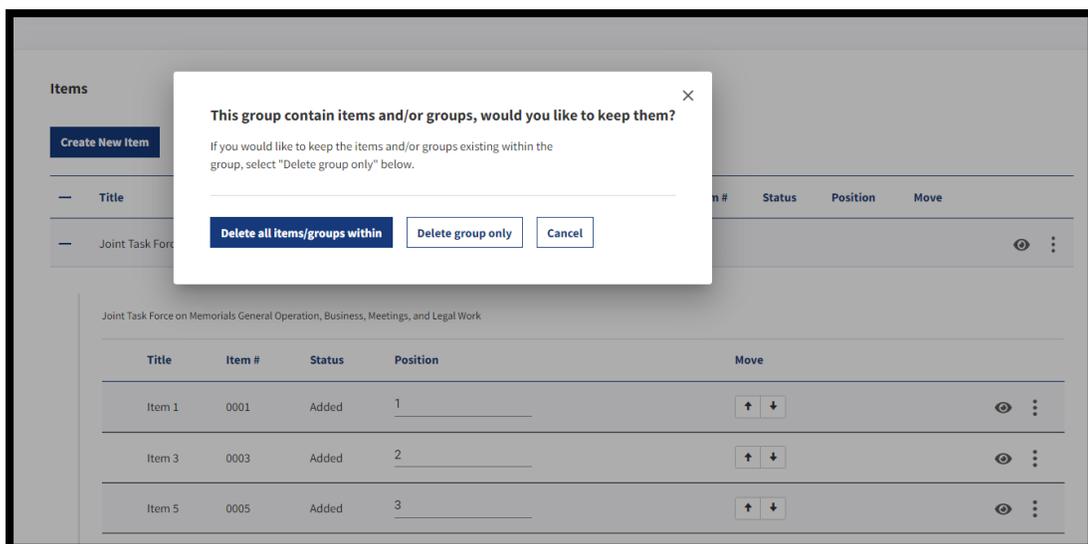


Figure 12: Delete Group Function Confirmation Window

3. Verify that the Items tab displays the updated results.

Notice the message that displays above the Items tab confirming that the group was deleted successfully.

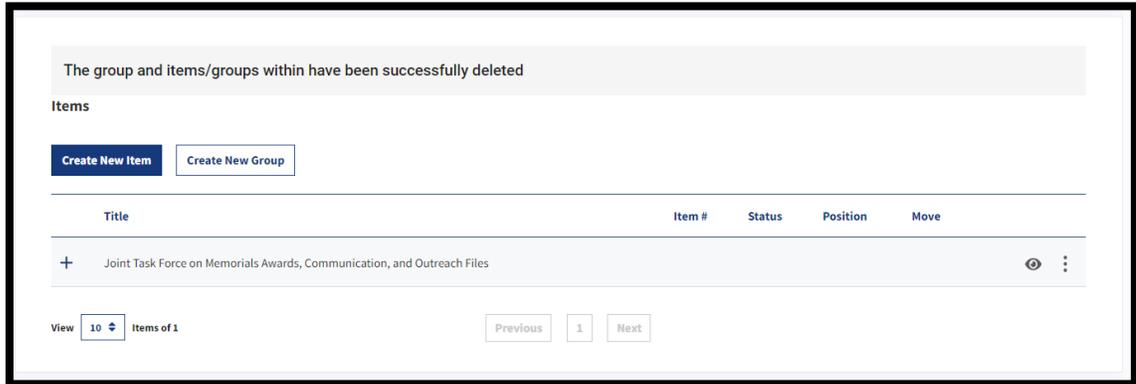


Figure 13: Updated Items Tab Populated with 1 Group

END.